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ABSTRACT

This paper describes a program, Leadership Enhancement for the Active Retired (LEAR), designed to tap talented and active retired people in rural areas for leadership roles. In cooperation with a community college, two classes of older adults were recruited and trained. Participants were classified as to their leadership activity both prior to retirement, and after participating in the LEAR program. After interviewing all the participants and studying related literature, a model of leadership activity in older adulthood was formulated. Leadership in older adulthood stems from three main overlapping paths: (1) "focus in retirement" helps retirees focus their energy, time, skills, abilities and interests; (2) "past history of community leadership" will most likely lead a person to community leadership roles after retirement; and (3) "preparation for leadership" includes motivation, confidence building, relevancy of the program, awareness of community needs, specific leadership skills, and recruitment of participants prior to retirement. The follow-up of the LEAR participants demonstrated that senior adults can, through a well designed educational program, be encouraged to assume community leadership roles after their retirement. Over half of the participants in LEAR are currently in community leadership roles. The appendix contains the table of contents for the training manual for this program and a list of related publications. (KS)

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A LEADERSHIP ENHANCEMENT PROGRAM FOR THE RURAL ACTIVE RETIRED

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A LEADERSHIP ENHANCEMENT PROGRAM FOR THE RURAL ACTIVE RETIRED

by

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This paper will describe an innovative program designed to tap talented active retired people in rural areas for leadership roles. Demographic information shows us a dramatic shift to an older society. Communities, especially smaller and rural communities, will feel the impact of this population shift in the dwindling number of younger people available to fill vital community leadership roles. As the out-migration of younger people in a community continues, older people left in the communities will need tools to revitalize their community.

Consider how many positions in local government are volunteer positions. Boards and commissions, elected offices, task forces; these are all filled by community volunteers. Older adults can fill these positions very capably with just a little education and encouragement.

The age of individuals filling these community leadership positions is irrelevant.

Older adults are active in all of the systems that make up their community; recreation and leisure time, cultural, educational, economic, political, welfare, religious, health, public safety, mass communication, physical, geographic, and ecologic. Just because people are stepping out of the economic system by retiring from paid employment, does not mean that they are giving up their roles in the other systems in the community. In fact, being free of their economic role frees up time that an older adult can apply in the other systems in a community.

Kalish (1981), warning of the "failure models" which portray older persons as helpless victims, urges his readers not to buy the stereotype, to instead emphasize and capitalize on their strengths. He expounds on his "Personal Growth" model of aging, listing reasons people can become involved in important issues after they retire: (1) many earlier responsibilities of family, work, etc. are not there taking time; (2) as a result, older adults don't have to worry about what people think; (3) having worked through fears and health challenges

they have proven they can cope successfully with these and go on to other things; (4) they have lots of discretionary time to spend as they wish, they can choose their priorities, and (5) they know the future is finite so want to make their mark on society, make the world a better place to live (p. 240).

Realizing this, an adult education program called "Leadership Enhancement for the Active Retired" was begun as part of a larger Kellogg Foundation project operating out of the Center on Rural Elderly at the University of Missouri - Kansas City. Using the leadership training program being conducted by the University of Missouri Extension (the EXCEL and the Family Community Leadership models), a course on leadership was adapted specifically for older adults. In cooperation with a community college, two classes of older adults were recruited and trained using this leadership material. A manual was written incorporating the content material and the process for delivering the program in other communities (Schultz & Olson, 1991).

Approximately two years after their participation in the program, participants were interviewed to see if new leadership roles had been assumed by these active elderly

individuals. An in-depth evaluation of the program was completed and the model, Paths to Leadership for Older Adults was developed (Schultz, 1991).

Few studies have been done about older adults in leadership roles. Two which were found classified active older adults into different categories based on their volunteer role. Reynolds (1988) interviewed older adults in rural Kansas, classifying them into three categories:

1) Leaders. This included elected or appointed leaders, the silver-haired legislator and charismatic leaders.
2) Instrumental volunteers who were the "doers" or the action group. They included bus drivers, tour guides, home delivered meal drivers, cooks, etc.
3) Expressive volunteers. Those who called, visited and corresponded with the sick and house bound elderly.

Chetkow-Yanoov (1983) discovered four distinct types of leaders among the retired from seven professional groups in Israel as follows:

1. Individually active persons who showed much initiative and engagement, functioning as role

models of persons enjoying their old age but not leaders in the usual sense.

2. Social leaders who visited friends, hosted many visitors, attended club activities, valued informal contacts, helped neighbors, assisted at large parties and celebrations and rated "helping others" high among their priorities.

3. Organizational leaders who attended meetings of voluntary organizations, served on boards and committees, helped raise funds, served in specific leadership roles, chaired meetings, initiated activities, expressed strong opinions and engaged in public relations.

4. Community leaders who were active politically, were involved in protest groups, served on public commissions, appeared on television, were featured in the media, had their writings published, enjoyed influencing others and had received public recognition for their leadership.

The LEAR program was targeted at active retirees who had the potential for leadership, not necessarily just

those currently in organizational or community leadership roles. The mark of real success would be if formerly inactive people were found to have taken on new leadership roles after the LEAR program.

For the purposes of this program community leadership is defined as leadership specifically exercised as part of the community development process. Community development may be defined as the organized effort to improve quality of life at the community-wide, neighborhood, or group level, where such an effort is organized and implemented locally, with reliance upon local resources, and complemented (when necessary) with external resources.

The community based theme of the definition implies that the primary focus of attention is the effort devoted by local people (public officials or community volunteers) to the development process. Community development professionals would play the array of roles typically accorded them (facilitator, educator, resource linker). A group of leadership educators in the Cooperative Extension Service formulated this definition of community leadership;

Leadership is best conceptualized as involving the

interrelationship among three dimensions: perception, process, and property. As a perception, leadership is the set of beliefs each group member holds regarding the behaviors and qualities characteristic of effective leaders. The process involves the use of noncoercive influence to facilitate group accomplishment of valued goals. As a property, leadership represents the qualities associated with effectively (or potentially) influencing the goal achievement process (Vandenberg, et al., 1988. p 88).

Participants were classified as to their leadership activity both prior to retirement and after participating in the LEAR program. They were further classified by the context in which they were exercising their leadership. Vandenberg, et al. (1988) identified seven contexts in which community leadership is exercised;

1. Public sector activities that are associated with local government, such as local legislative bodies (e.g. city council, county board of commissioners, school board); chartered and mandated departments and commissions; and citizen advisory

committees/ad hoc task forces.

2. Private sector human service agencies (private, nongovernmental agencies) (e.g. Salvation Army)
3. Community service/civic organizations (e.g. Kiwani's, Chamber of Commerce)
4. Groups affiliated with community institutions (excluding government) e.g. church "outreach"
5. Neighborhood groups and organizations (e.g. food co-op)
6. Locally-relevant special-interest groups and organizations (e.g. Mothers Against Drunk Driving, a peace group, or a pro-choice group)
7. Coalitions established to meet local needs/address local problems (eg.g. council of metropolitan neighborhood organizations)

After interviewing all of the participants and studying the related literature, a model of leadership activity in older adulthood was formulated. Leadership in older adulthood stems from three main paths which overlap greatly; Focus in Retirement, Preparation for Leadership and Past History (Figure 1). Any one or all of these paths can contribute to factors which lead an

older adult into a leadership role. The paths can be experienced in any order and any combination of the three paths can be present. The first path is "Focus in retirement."

Focus

Retirees need to find a new focus for their life after active employment. A program like Leadership Enhancement for the Active Retired can help them focus their energy, time, skills, abilities and interests and realize that they have much to offer a community. Communication skills and prior leadership training can be focused so the individual can see how these skills can be transferred to other activities.

Retirees also need to focus their interests. The number of people who expressed a need to fill their time indicates that some people still have difficulty adjusting to retirement and are looking for meaningful roles. As individuals have time to take a new focus, they become aware of some of the issues important in their community. That awareness allows them to focus on new volunteer roles to fill their time in meaningful ways. Leadership Enhancement for the Active Retired helped them focus on what they wanted to get involved in

and why.

Past History of Community Leadership

A history of community leadership, prior to retirement, will most likely lead a person to community leadership roles after retirement. Retirees who always had an interest in an issue can now take the time to become involved in groups that relate to that issue. Those with a past history of leadership are more aware of the needs in the community and the rewards active involvement can bring. The follow-up with the LEAR participants does tend to support the premise paraphrased from Chambre (1987) that "these older leaders are leaders who have grown old."

Preparation for Leadership

That older adults can be prepared for leadership roles was the main premise of the adult education program, Leadership Enhancement for the Active Retired. Preparation for leadership has to let people know what needs doing, make them want to do it, show them how to do it, give them the confidence to do it and show them that it is relevant to their life. Preparation for leadership roles in older adulthood relates to five important dimensions. These are motivation, confidence, awareness

of needs, relevance and specific skills. These five dimensions are components of a successful Leadership Enhancement program (Figure 2).

Motivation

Gaining the motivation to actually engage in community leadership roles was mentioned as the most useful thing learned in the program. Increased awareness and confidence feed this motivation, thus the interrelated nature of these components is reinforced. These participants listed a feeling that it was their civic duty and that they were looking for fulfilling roles as they main reasons they decided to participate.

Confidence Building

Confidence building is another very important aspect. As Cross (1981) points out, learners must have confidence in themselves before they will feel comfortable with learning. Building as it does on the "self actualization orientation" toward older adults (Moody, 1976), this Leadership Enhancement program is certainly an appropriate avenue for older adults to express themselves in meaningful ways.

Relevancy

A program educating older adults for community leadership roles must be a very experiential, practical course, with a lot of opportunity to practice in small groups. The older adults have to see how the content can be applied to their own experience. Relevance to the local community could be accomplished by having the class work on an actual project together, or by using locally relevant simulations and exercises. Persons facilitating a program for older adults need to be well versed in the theories of adult education so that learners can be treated as resources in the class and there is a lot of active participation, discussion and reflection on their own experience.

Awareness

Awareness of the needs of the community is another component of a leadership program that is important. The people who move to a new retirement community may not be immediately aware of issues and problems in the community. They may be used to certain community services and not finding them, want to develop the systems that will put them in place. The awareness of the need for services brings the need for new leadership

skills and abilities. People who have been employed in their own community for years may not be aware of many of the public issues that face city and county government. For these reasons it is important to include sessions where city, county and regional organizations can inform the participants of their specific needs.

Specific Skills

The specific skills addressed in LEAR are those typically given in a leadership course. Since retirees may be steeped in more traditional hierarchial leadership patterns, time is spent showing that leadership is a set of functions rather than the position one holds. Creating a vision for a positive future is stressed and techniques for analyzing issues and dividing them into workable sub-components are practiced. Time is spent honing the communication skills, learning to work as a member of a team and learning how to run a meeting effectively.

Recruitment

The evaluation of LEAR supported previous research which showed that adults use education as a way to prepare for or adjust to the transitions of adulthood (Aslanian & Brickel, 1980). Recruiting participants

close to or even prior to their retirement can capitalize upon this transition period.

The number of Leadership Enhancement for the Active Retired participants who stated that they were persuaded by an individual to join the group is noteworthy. Personal outreach efforts were shown to be the best recruitment strategy. Also frequently mentioned are the local newspaper and the local radio station.

While it is not universally true, and a gross stereotype to eliminate potential participants after age 70, it seems that there is a tendency for participation in community leadership roles to drop off after that age. Therefore, recruitment efforts should be directed to retired persons under that age. Retirees in the younger age groups would be more likely to still have their spouse with them. This would be part of the rationale for marketing this type of program as something married couples could do together.

Times of scarce resources for programs may be times of scarce resources for potential participants. Economic barriers will have to be acknowledged and responses to specific needs provided by the system. Scholarships and subsidy for programs will be needed to develop the

leadership potential in low income areas.

Recruitment of minority individuals into a leadership program would have to take into consideration the factors mentioned in the model, "Paths to leadership for older adults". Lack of opportunity to build a history of past leadership, lack of opportunity to have any of the preparation for leadership, and a lack of time to focus on any but security and safety needs will need to be addressed. Programs for voluntary, self-selected individuals will tend to remain similar to this sample unless specific recruitment efforts are made.

Conclusion

The follow-up of the LEAR participants demonstrated that adult education is a vehicle by which we can "assist older people in contributing their wisdom to society" (McClusky, 1971). Senior adults can, through a well designed educational program, be encouraged to assume community leadership roles after their retirement. The goal of the program, to stimulate new leadership among the active retired was met as over half of the participants in LEAR are currently in community leadership roles. Women were especially impacted by this program as 70% of the women (compared to 35% of the men)

are actually in community leadership roles. These are new roles for many of the women, only 30% were in leadership roles prior to retirement. Older women will most likely be seeking and filling many new leadership roles in the future.

Targeted, specific recruitment of older adults into community leadership enhancement programs will grow in importance as the demographic trends have their impact. This valuable resource of talented, experienced community volunteers can be tapped for those vital community leadership roles needed to help a rural community survive.

The manual, Leadership Enhancement for the Active Retired, can be ordered from the Center on Rural Elderly, University of Missouri - Kansas City, 5245 Rockhill Road, Kansas City, Missouri 64110-2499. Telephone (816) 235-2180.

Carol M. Schultz is available for consultation to communities wishing to develop a leadership program for older adults. Contact her at: Center for the Study of Aging, University of Missouri - Columbia, 202 Clark Hall, Columbia, Missouri 65211. Telephone (314) 882-6011.

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Figure 1. Paths to Leadership for Older Adults

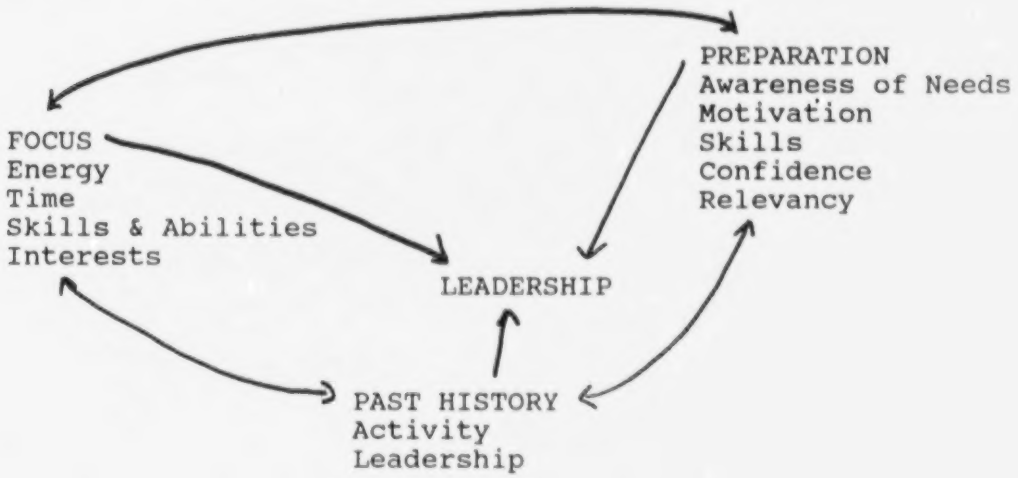

Figure 2. Components of a Successful Leadership Enhancement Program

LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

A Community Leadership
Training Manual

With Separate Appendix of Resource Materials

Editors
Carol M. Schultz
and
Philip Olson

CENTER ON RURAL ELDERLY

LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

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A. Resource materials for lecture series
B. Sample forms

- **Directory of Education Programs for Caregivers of Elders**
- **Directory of Health Education Programs for Elders**
- **Directory of Intergenerational Programming**

These directories are the result of one of the center's primary activities, which has been to identify, catalog and review programs in caregiver education, health education and intergenerational relations. Directories contain information on cost, implementation, funding, evaluation, and contacts for each program included. A special effort was made to identify programs specifically developed for rural and minority audiences. Additionally, names and addresses of program reviewers, all interested in rural elders, will help expand the directory user's network of professional resources.

- **Reducing Barriers to Participation in Family Caregiver Training: Respite Options for Caregiver Training**

This booklet addresses a major barrier to caregiver education: respite for caregivers while they are attending caregiver training. The issue is particularly problematic because respite is less available in rural areas. This guide identifies ways caregiver trainers can provide respite and offers some principles that will assist in the process. It contains a list of caregiver-education programs, an extensive bibliography and a list of "self-help" materials for caregivers.

- **Health Promotion for the Rural Black Elderly: A Program Planning and Implementation Guide**

This is a step-by-step guide for developing and implementing health-promotion programs among rural black elders. The guide offers suggestions for reaching low-literacy elders and providing low-budget programs using local resources. It contains information for accessing printed resource materials and a list of toll-free technical-assistance numbers.

- **Leadership Enhancement for the Active Retired**

Training materials based on two years of demonstration and development offer rural elders the opportunity to keep active both physically and mentally while addressing local problems. This program teaches skills and techniques of leadership and how to identify community resources for problem-solving. Materials include a training manual with curricular materials, implementation guidelines, resources and supplemental handouts.

PUBLICATION ORDER FORM

Title		Price	Quantity	Cost
1. *Directory of Education Programs for Caregivers of Elders*		$12.00	_____	_____
2. *Directory of Health Education Programs for Elders*		$10.00	_____	_____
3. *Directory of Intergenerational Programming*		$18.00	_____	_____
4. *Reducing Barriers to Participation in Family Caregiver Training: Respite Options for Caregiver Training*		$ 8,00	_____	_____
5. *Health Promotion for the Rural Black Elderly: A Program and Implementation Guide*		$ 8.00	_____	_____
6. *Leadership Enhancement for the Active Retired*		$22.00	_____	_____
7. Center newsletter *Bridges*	Yes_____	No_____		NC

Make check payable to:
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